



UNC  
HUMAN RESOURCES

*Workforce Strategy, Equity, and Engagement Division*

## **OFF-CYCLE & PROBATIONARY REVIEWS**

## **UNIVERSITY SHRA PERFORMANCE MANAGEMENT PROGRAM**



ANNUAL PERFORMANCE APPRAISAL CYCLE (Dates From/To):		01/14/19	to	03/31/19
Dept. Name:	SPH Finance	Employee Name:	Supriya Khazanie	
Dept. #:	460105	Employee ID:	709478072	Position #: 20029032
Supervisor Name:	Katie Thornsvarð	Employee Classification:	Financial Analyst	
Supervisor Title:	Assistant Dean for Finance and Business	Competency Level:	Advanced	

**OFF-CYCLE REVIEWS**

Off-Cycle reviews are check-ins between supervisors and employees during the performance cycle that occur as often as is necessary. There are several types of off-cycle reviews:

- Interim reviews must be completed by October 31.
- Probationary reviews must be completed quarterly (recommended July, October, January, April).
- Transfer reviews must be completed when a supervisor or employee transfers to another position.
- Employee-requested reviews can be completed anytime during the cycle but must be at least 60 days from the last review and can only request once a cycle.

Supervisors may conduct additional off-cycle reviews as often as deemed necessary. Supervisors are expected to meet with the employees, review the employee's progress on the institutional and individual goals on the performance plan, and provide the employee an opportunity to ask for any clarification of expectations. The supervisor documents the conversation (at least a paragraph summarizing the employee's performance so far in the cycle) and both the supervisor and employee initial the review.

Date of Review	Interim	Transfer	Employee- Requested	Supervisor Initials	Employee Initials
04/16/19	X (90 day)				
<p><b>Comments:</b></p> <ul style="list-style-type: none"> <li>• Supriya has amazing technical skills and I am very pleased with the work she is doing on the funding allocation model. She has very advanced Excel skills and has done a great job utilizing those skills to structure a model that is flexible and can be modified on the fly.</li> <li>• She is very analytical and I like the way she works through issues and challenges in her work.</li> <li>• She is extremely generous in sharing her knowledge and expertise with her teammates. I have witnessed Supriya on multiple occasions sharing tips and tricks that will help her teammates perform their work better, especially as it relates to Excel. This is exactly how I want team members engaging with each other, so I strongly encourage her to keep doing this.</li> <li>• She takes ownership of her work and admits to errors (of which there have been very few).</li> <li>• She has not found the right balance between work and social time during the work day. She needs to cut down on the socializing and make sure she is putting in a full day of work.</li> <li>• She needs to develop more self-awareness regarding her interactions with others and how her comments and contributions to conversations are being perceived.</li> <li>• I am very happy to have Supriya on my team. She has great potential to contribute to the school in very meaningful ways. I am excited about the ways she is going to help us elevate our financial data delivery, especially through Tableau.</li> </ul>					

<b>ANNUAL PERFORMANCE APPRAISAL CYCLE (Dates From/To):</b>		<b>01/14/19</b>	<b>to</b>	<b>03/31/19</b>
<b>Dept. Name:</b>	SPH Finance	<b>Employee Name:</b> Supriya Khazanie		
<b>Dept. #:</b>	460105	<b>Employee ID:</b> 709478072	<b>Position #:</b>	20029032
<b>Supervisor Name:</b>	Katie Thornsvarð	<b>Employee Classification:</b> Financial Analyst		
<b>Supervisor Title:</b>	Assistant Dean for Finance and Business	<b>Competency Level:</b> Advanced		

<b>Date of Review</b>	<b>Interim</b>	<b>Transfer</b>	<b>Employee- Requested</b>	<b>Supervisor Initials</b>	<b>Employee Initials</b>
<b>Comments:</b>					
<b>Date of Review</b>	<b>Probationary Review</b>			<b>Supervisor Initials</b>	<b>Employee Initials</b>
<b>Comments:</b>					
<b>Date of Review</b>	<b>Probationary Review</b>			<b>Supervisor Initials</b>	<b>Employee Initials</b>
<b>Comments:</b>					



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		Position #:	20029032
Supervisor Name:	Katie Thornsvarð	Employee Classification:	Financial Analyst
Supervisor Title:	Assistant Dean for Finance and Business	Competency Level:	Advanced

Date of Review

Probationary Review

Supervisor Initials Employee Initials

Comments:

Employees must receive a competency assessment: 90 calendar days after starting in the position or after a reclassification; as part of the annual performance appraisal process; or, any other time an assessment is appropriate.

<b>Dept. Name:</b>	SPH Finance	<b>Employee Name:</b>	Supriya Khazanie		
<b>Dept. #:</b>	460105	<b>Employee PID:</b>	709478072	<b>Position #:</b>	20029032
<b>Supervisor Name:</b>	Katie Thornsvar	<b>Classification:</b>	Financial Analyst		
<b>Supervisor Title:</b>	Assistant Dean for Finance	<b>Pos. Comp. Level:</b>	<input type="checkbox"/> Contributing <input type="checkbox"/> Journey <input checked="" type="checkbox"/> Advanced		
<b>Review Type:</b>	<input checked="" type="checkbox"/> 90-day <input type="checkbox"/> Annual <input type="checkbox"/> Other		<b>Date of Assessment with Employee:</b>	4-16-2019	

#	LIST OF POSITION COMPETENCIES (For detailed descriptions of the competency standards, please see the Office of Human Resources website.)	EMPLOYEE COMPETENCY ASSESSMENT		
		Developing	Applied	Broadly Demonstrated
1.	Professional knowledge	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2.	Communication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	information analysis and decision making	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>OVERALL COMPETENCY RATING:</b>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

No changes since last assessment ☐

#### OVERALL COMMENTS

Supervisors must address the specific competencies and ratings that have changed since the last assessment. A development plan must be included for all ratings of Developing.

**PROFESSIONAL KNOWLEDGE:** Supriya's professional knowledge (Excel, Tableau, financial modeling) is top-notch. I'm very excited about all the analyses I can assign to her. She is going to elevate our financial data delivery to a new level.

**COMMUNICATION:** Supriya needs to work on her communication skills. This recommendation is two-fold: 1) she needs to develop her soft skills more to ensure that she is communicating in effective ways with leaders, coworkers and peers and 2) she needs more practice engaging with leadership and determining appropriate levels of communication (e.g., leadership does not need to understand chartfield level data). To address the first recommendation, I would like Supriya to take some classes on effective communication. To address the second recommendation, I will mentor Supriya on effective communication styles at different levels of the organization.

**INFORMATION ANALYSIS AND DECISION-MAKING:** Supriya is new and learning how to pull data out of the financial systems, how to clean the data, and how to include appropriately in various analyses. The more she works with the data and she sees how I review and adjust her analyses, she will become proficient in this area. I would expect within 6 to 9 months that she will be self-sufficient in analysis and use of financial data.

#### SIGNATURES

2<sup>nd</sup> - Level  
Supervisor:



Date:

4/24/19

Supervisor:	<i>Robert Hernandez</i>	Date:	<i>4/16/19</i>
I acknowledge that I have received this competency assessment. I understand that my signature below does not necessarily imply agreement with the ratings given or the comments included, and that if I choose, I may write a response to include with this assessment document.			
Employee:	<i>[Signature]</i>	Date:	<i>4/25/19</i>